FREE FORM // TREATMENT COORDINATOR TO DOCTOR

The New Patient Handoff

Five blanks your treatment coordinator fills in before the doctor ever walks in to meet a new patient.

PRACTICE LOGO

[Practice name]

PATIENT NAME OR ID | CONSULT DATE AND TIME | TREATMENT COORDINATOR | DOCTOR

HOW TO USE Fill this in on the phone and before the consult. Write blank 1 word for word: it is what you use when it comes to closing time. Hand it to the doctor before they ever walk in. The questions for each blank are on page 2.

1 Who they are, and why they're here

IN THEIR OWN WORDS

Word for word. It is what you use when it comes to closing time.

THEIR WORDS exactly as they said it

2 Why now?

WHAT CHANGED

These are very valuable things the doctor should be aware of.

☐ A wedding or event coming up ☐ Want to date again ☐ In pain ☐ Teeth getting loose ☐ Other

IN THEIR WORDS

3 Where are we focused?

THE AREA

Is it just what's visible? Is it full mouth? Is it top? Is it bottom?

☐ Just what's visible ☐ Top ☐ Bottom ☐ Full mouth ☐ Not sure yet

NOTES

4 Financing

GET AHEAD OF IT

Payment plan, or are they prepared to pay 100% cash?

☐ Payment plan ☐ 100% cash ☐ Not discussed yet

MONTHLY PAYMENT THEY ARE COMFORTABLE WITH $

CREDIT RANGE only if they shared it

READY TO START

☐ As soon as possible ☐ In the next 3 months ☐ Just looking

5 Exam prep

THE HANDOFF

Prepare the doctor for the exam. Say it out loud using the script on page 2.

WHAT THE DOCTOR SHOULD KNOW BEFORE WALKING IN concerns, questions about the process, what to touch on

☐ Handed to the doctor before they walked in

A template, not medical or financial advice. Only write down what the patient told you, and keep it with the patient record.

FREE FORM // SAY IT LIKE THIS

Fill it in on the phone

The questions behind each blank, the financing question word for word, and the handoff your coordinator says to the doctor.

01 The question for each blank

ON THE PHONE

BLANK	ASK
1 Who + why	What's going on? How long have you been dealing with this?
2 Why now	What made you look into treatment now?
3 Focus	Is it just what's visible, or are we looking at the full mouth? Top, bottom, or both?
4 Financing	The question in the box below.
5 Exam prep	Is there anything about the process you want the doctor to cover?

02 The financing question (blank 4)

SAY IT JUST LIKE THIS

"Do you want to get started with treatment as soon as possible and then just make your first payment in 30 to 45 days, or did you want to come out of pocket and put money towards treatment?"

The goal: get them to say **"If I could just get started with treatment and make my first payment, that would be awesome."** Don't run away from the financing conversation. Get ahead of it and make it something positive, so nobody feels bad about a payment plan. Use your lender's real terms.

03 The handoff, out loud (blank 5)

COORDINATOR TO DOCTOR

SCRIPT // BEFORE THE DOCTOR WALKS IN

"Doc, this is `[name]`. `[Name]` is here because `[blank 1, their words]`. The reason now is `[blank 2]`. They want `[blank 3]`. They want to stay `[blank 4: payment plan or cash, monthly comfort]` and they're ready to get started `[when]`. They had some concerns about `[blank 5]`, so I would definitely touch on that."

04 Why it works

- The doctor walks in already knowing the person, the reason, the area and the money. No repeating questions in the chair.
- Blank 1 in their own words is what you hand back to them at closing time.
- Money is handled before the exam, so the close is about the plan, not the price.
- Get your team bought in to closing as a team. Save this page for your coordinator.

EXAMPLE

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PRACTICE LOGO

[Practice name]

PATIENT NAME OR ID	CONSULT DATE AND TIME	TREATMENT COORDINATOR	DOCTOR
Blake	Thu 10:30 am	Kayla	Dr. M

EXAMPLE A filled-in handoff, so your team can see what good looks like. The patient and details are an example.

1 Who they are, and why they're here

IN THEIR OWN WORDS

Word for word. It is what you use when it comes to closing time.

"Chewing is becoming more difficult. My bridge is falling apart, and my canines are getting a little loose."

2 Why now?

WHAT CHANGED

These are very valuable things the doctor should be aware of.

- [x] A wedding or event coming up
- [ ] Want to date again
- [ ] In pain
- [x] Teeth getting loose
- [ ] Other

Daughter's wedding in 6 months. Wants to smile with confidence.

3 Where are we focused?

THE AREA

Is it just what's visible? Is it full mouth? Is it top? Is it bottom?

- [ ] Just what's visible
- [ ] Top
- [ ] Bottom
- [x] Full mouth
- [ ] Not sure yet

Wants a full mouth restoration

4 Financing

GET AHEAD OF IT

Payment plan, or are they prepared to pay 100% cash?

- [x] Payment plan
- [ ] 100% cash
- [ ] Not discussed yet

MONTHLY PAYMENT THEY ARE COMFORTABLE WITH: under $400 / month

CREDIT RANGE: 750+ (he shared it)

READY TO START

- [x] As soon as possible
- [ ] In the next 3 months
- [ ] Just looking

5 Exam prep

THE HANDOFF

Prepare the doctor for the exam. Say it out loud using the script on page 2.

Had concerns about the process and how it can be done in 24 hours. Touch on that, and on his options.

- [x] Handed to the doctor before they walked in

A template, not medical or financial advice. Only write down what the patient told you, and keep it with the patient record.

WANT THE WHOLE SYSTEM?

The Implant Consult Playbook

This handoff is the short version. The Playbook is the full consult system it comes from, with the deeper forms your team fills in at every step.

01 What you get

28 PAGE SYSTEM + 14 TOOLS

- **Doctor Handoff Brief:** the full version of this form.
- **Patient Consultation Questionnaire:** what to ask before the consult, in the patient's words.
- **Consult Notes and Discovery Sheet:** for the coordinator in the room.
- **Your Plan Patient Summary:** what the patient takes home.
- **Financial Options Worksheet** and the Spouse or Partner Call Planner.
- **Trackers, templates and cards:** follow-up tracker, weekly scorecard, text and email templates, desk cards.

Built from the same method as the five blanks: know the person, the reason, the area and the money before the doctor walks in.

02 Get it

ONE PRACTICE LICENSE, INSTANT DOWNLOAD

Get the Playbook + Toolkit →

CLOSINGMORECASES.COM/IMPLANT-CONSULT-PLAYBOOK

Fillable PDFs, Word and Excel files your team can use the same day. Questions: DM @blakekhundley on Instagram.

